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COURSE BROCHURE

# EDRM Records Capture, Retention and Disposition Training Course

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Registered in the United Kingdom and Saudi Arabia

# EDRM Records Capture, Retention and Disposition Training Course

EDRM Records Capture, Retention and Disposition is a 1-week training course for records officers, archivists and departmental records coordinators, in which each participant builds an EDRM retention and disposition schedule for one business function. Organisations keep many electronic files too long and delete others too early. Jupiter Prime Training delivers this course for practitioners who decide what is kept, for how long and how it leaves the system.

## Why EDRM Records Capture, Retention and Disposition Matter Now

Three pressures make the electronic records lifecycle urgent. Email, collaboration sites and scanned paper pour content into repositories faster than anyone can sort it, so records go undeclared and unclassified. Litigation, audits and information requests demand that relevant files are preserved under legal hold and found quickly. Archivists also face growing volumes of born-digital material that must stay readable for decades. Organisations that apply agreed retention rules shrink their repositories safely and answer requests with confidence; others either hoard or lose evidence. The course draws on ISO 15489-1 for records concepts and appraisal and ISO 16175 for the functional requirements EDRM software should meet.

## Who Gains Most from EDRM Records Capture, Retention and Disposition

- Officers who declare records and assign them to file plan classes
- Archivists who appraise records for long-term or permanent keeping
- Coordinators who apply departmental retention rules day to day
- Specialists who place and lift legal holds on relevant content
- Practitioners who prepare disposition reviews and destruction certificates

A records unit and its departmental coordinators gain most when they attend together.

## EDRM Records Capture, Retention and Disposition Capabilities

Each capability ties a records decision to evidence an auditor may request.

- Apply declaration rules that turn working documents into fixed, authentic records — departmental coordinators and authors
- Build a file plan class structure aligned with business functions and activities — the records officer
- Specify retention periods and trigger events for each records class — legal counsel and function owners
- Test legal hold procedures that suspend disposition for relevant content — litigation and audit teams
- Design disposition reviews that approve destruction, transfer or extended keeping — archivists and approving managers
- Communicate schedule rules through a written retention and disposition schedule — staff, auditors and archive services

## Key EDRM Records Capture, Retention and Disposition Terms

- Records declaration — fixing a document as a record so its content can no longer be edited.
- File plan — a scheme of classes based on business functions for organising records and attaching retention rules.
- Retention period — the length of time a records class must be kept, counted from a defined trigger event.
- Legal hold — an instruction that suspends disposition for records relevant to litigation, audit or investigation.
- Disposition — the final action on records at the end of retention, such as destruction, transfer or extended keeping.
- Appraisal — the evaluation of records to decide their value and how long they should be kept.

## EDRM Records Capture, Retention and Disposition Day by Day

### Day 1: The Electronic Records Lifecycle

- Records Concepts From ISO 15489-1 — Authenticity, Reliability, Integrity and Usability
- Documents Versus Records — Deciding the Moment of Declaration
- Lifecycle Stages in EDRM — Capture, Use, Keeping and Final Action
- Born-Digital and Scanned Records — Choosing Formats for Long Keeping
- Records Inventory — Surveying What a Function Creates and Holds

### Day 2: Capture and Classification

- Declaration Rules and Triggers — Manual, Rule-Based and Automatic
- File Plan Design — Functions, Activities and Transactions as Classes
- Records Metadata — Mandatory Fields for Context and Evidence
- Email and Collaboration Content — Capturing Records From Busy Channels
- Functional Requirements From ISO 16175 — What EDRM Software Must Support

### Day 3: Retention Rules and Legal Holds

- Appraisal Methods — Weighing Business, Legal and Historical Value
- Retention Periods and Trigger Events — Closure, Expiry and Completion
- Retention Schedule Format — Classes, Periods, Actions and Authority
- Legal Hold Procedures — Notices, Scope and Release
- Vital Records — Identifying Records Needed to Keep Operating

### Day 4: Disposition Decisions

- Disposition Review Workflow — Listing, Checking and Approving Batches
- Certified Destruction — Methods, Evidence and Destruction Certificates
- Transfer to Archives — Packaging, Metadata and Custody Change
- Exceptions and Extensions — Handling Records Needed Beyond Retention
- Disposition Audit Trail — Proving What Was Destroyed and Why

## Day 5: Practising the EDRM Retention and Disposition Schedule

- Classification Exercise — Applying Day Two File Plan Rules to Hospital Records
- Retention Exercise — Applying Day Three Appraisal to Finance Department Records
- Disposition Scenario — Applying Day Four Workflow to a Public Archive Batch
- Schedule Validation — Checking Rules With Legal and Function Owners
- EDRM Retention and Disposition Schedule — Classes, Periods, Holds and Actions

## Applying EDRM Records Capture, Retention and Disposition After the Course

- Map the records of one business function to draft file plan classes with proposed retention periods.
- Run a trial disposition review on an expired batch and file the evidence.

## EDRM Records Capture, Retention and Disposition Questions FAQ

### What are EDRM records capture, retention and disposition, and why do they matter now?

EDRM records capture, retention and disposition are the steps that fix documents as records, keep them for set periods and end their life lawfully. They matter now because content volumes, audits and litigation make both over-keeping and early deletion costly.

### Which roles gain most from EDRM records capture, retention and disposition training?

Records officers, archivists and departmental records coordinators gain most. Legal staff who approve holds also benefit.

### How does an EDRM records capture, retention and disposition course differ from an EDMS user skills course?

An EDRM records capture, retention and disposition course focuses on declaring records, file plans, retention and final action. An EDMS user skills course covers daily uploading, versioning, search and workflows for working documents.

### What do you bring back from EDRM records capture, retention and disposition training?

You bring back a retention and disposition schedule for one business function, ready for approval.

## EDRM Records Capture, Retention and Disposition: The Way Forward

The EDRM retention and disposition schedule sets out each records class, its retention period, trigger event and final action for one business function. Its first use is a disposition review of records already past their period, led by the records officer with the function owner. Revisit it after the first approved destruction or transfer, when real batches show which classes need clearer triggers.